

Premium Integrity

Medicare Secondary Payer

Validation Solution for Medicare Advantage Plans

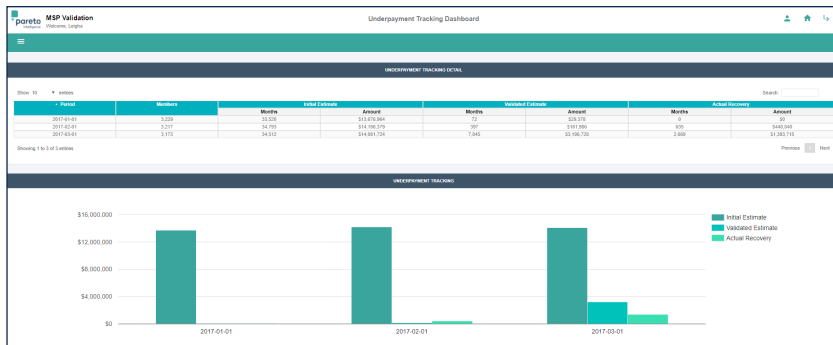


Overview of the Solution

Accurate tracking of Medicare Advantage (MA) members' Medicare primacy status can have financial and compliance implications for MA plans. Continuous monitoring and reconciliation of premium payments is necessary to identify and correct issues with improper Medicare Secondary Payer (MSP) status and ensure revenue is accurate and complete.

Pareto Intelligence's web-based MSP Validation Solution provides an easy-to-use workflow platform for MA plans to autonomously identify and track capitation payment discrepancies from the Centers for Medicare and Medicaid Services (CMS). Through actionable dashboards, detailed reports, and a user-friendly interface, the MSP Validation Solution allows plans to effectively manage ongoing reconciliation and recovery efforts.

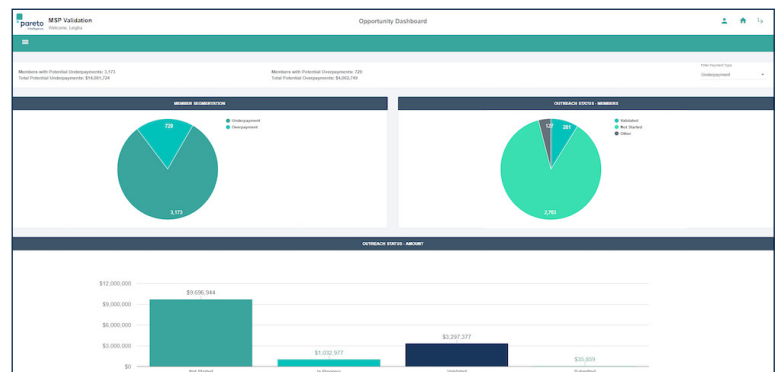
Identify & Track Monthly Underpayments & Overpayments



+ Tracks recoveries based on Monthly Membership Report (MMR) period

- **Initial Estimate:** Potential underpayments or overpayments identified by Pareto
- **Validated Estimate:** Underpayments or overpayments confirmed based on client outreach
- **Actual Recovery:** Actual amounts recouped or retracted for validated mispayments

Monitor Ongoing Validation & Recovery Efforts



- + Displays the identified potential recoveries and retractions by MMR period
- + Displays progress and associated recoveries through each stage in the validation process (Not Started, In Progress, Validated, Submitted, Complete)

Pareto Intelligence was launched by



Manage Your Validation Workflow

Workload Assignment

ASSIGNED MEMBERS BY EMPLOYE

Employee Name	# of Assigned Members	Not Started	In Progress	Validated	Submitted	Completed	Workload Details
Logan Davis	45	20	0	0	0	0	Details
Bob Davis	45	20	0	1	0	0	Details

MEMBERS TO BE ASSIGNED

Type	MMR ID#	Member ID	Last Name	First Name	Total CR's Months	Exp'd CR's Months	Last CR's Month	Potential Under/Overpaid Months	Priority
Underpayment	990253102	990253102	WAGNER	WAGNER	16	2016-01-01	2016-01-01	0	High
Underpayment	990277102	990277102	WAGNER	WAGNER	39	2016-01-01	2016-01-01	1	High
Overpayment	991993902	991993902	CORDEZ	WAGNE	17	2016-06-01	2016-12-01	2	High
Underpayment	991793302	991793302	MACWEEK	ELIASETH	14	2016-02-01	2017-02-01	14	High
Underpayment	991461902	991461902	WATTS	SMITH	39	2016-01-01	2016-01-01	12	High
Underpayment	991030302	991030302	BELLEUS	HOEL	30	2014-10-01	2014-12-01	3	High
Underpayment	991846102	991846102	CHUDWAR	MARTIN	18	2016-01-01	2017-03-01	16	High
Underpayment	990661902	990661902	STROMWA	LESTINE	27	2016-01-01	2016-01-01	1	High
Underpayment	9907100A	9907100A	HODLICK	LESTER	7	2016-06-01	2016-12-01	7	High
Underpayment	990610000	990610000	WAGNER	WAGNER	16	2016-10-01	2016-12-01	3	High

- + Displays associate workload statistics and allows supervisor to assign workload
- + Includes configuration option to auto-assign members to associates
- + Ability to unassign member(s) from an associate (e.g., Associate is on vacation or a leave of absence)

Capture Key Validation & Submission Information

- + Allows associates to validate information on assigned members in a centralized location
- + Tracks all outreach and Electronic Correspondence Referral System (ECRS) submission information, allowing accurate capture of documentation
- + Contains detailed log with the ability to save comments or notes

Underpayment Validation & Submission

MMR ID#	Member ID	DOB	SSN	Last Name	First Name	DOB	SSN	First CR's Mth	Last CR's Mth	Validated Months	Submitted Months	Completed Months	Workload Details
990253102	990253102	1980-01-01	123456789	WAGNER	WAGNER	1980-01-01	123456789	2016-01-01	2016-01-01	0	0	0	Details
990277102	990277102	1980-01-01	123456789	WAGNER	WAGNER	1980-01-01	123456789	2016-01-01	2016-01-01	1	0	0	Details

Perform Reviews & Audits

Member Detail

MMR ID#	Member ID	Last Name	First Name	DOB	SSN	First CR's Mth	Last CR's Mth	Validated Months
99141000A	99141000A	BERNARD	ETNA	1949-01-18	123456789	2016-01-01	2016-01-01	42

CR Validation PT

11/27/2017 - 11/27/2017 - 11/27/2017 - 11/27/2017 - 11/27/2017

ECRS Submission

11/27/2017 - 11/27/2017 - 11/27/2017 - 11/27/2017 - 11/27/2017

LOGS & COMMENTS

11/27/2017 01:34:44 AM - System: Logan Davis entered the CR validation process
 11/27/2017 01:37:54 AM - System: Logan Davis entered the CR validation process. Reason: member is not in system
 11/27/2017 01:37:54 AM - System: Reason submitted to ECRS. Waiting for accepted data
 11/27/2017 01:38:08 AM - System: CR was accepted
 11/27/2017 01:38:08 AM - System: ECRS submission completed successfully. Submitted for final manager review

- + Displays completed validation and ECRS submission efforts made by associates
- + Enables supervisor to approve or reject a validation or ECRS submission
- + Customizable review process – review all, just a portion or auto-approve

Log Recovery & Retractions Details

- + Displays recovery and retraction details by MMR period
- + Views available for both underpayments and overpayments

Underpayment Recoveries & Retractions Detail

RECOVERY MEMBERS

Date Discovered	Date Identified	MMR ID#	Last Name	First Name	Validated Months	Payment Months	Payment Amount
2017-02-01	2017-01-01	201039410D	HAAK	BARBARA	0	2	\$515.82
2017-02-01	2017-01-01	11648970Z	TARSA	ALMA	4	4	\$127.68
2017-02-01	2017-01-01	14154627W	AMOK	ERNESTINE	0	3	\$1,490.89
2017-02-01	2017-01-01	10715434 9C	WINNE	ALICIA	0	3	\$816.04
2017-02-01	2017-01-01	29499271 9K	HENDER	SANDRA	0	1	\$168.23
2017-02-01	2017-01-01	726198790U	JAMIE	SALLY	0	11	\$2,883.96
2017-02-01	2017-01-01	191256270Y	GLASSEN	GLORIA	0	3	\$1,154.58
2017-02-01	2017-01-01	16015024Z	ERWIN	KENNETH	0	2	\$677.92
2017-02-01	2017-01-01	97255166S	ERSEW	KAREN	0	2	\$477.25
2017-02-01	2017-01-01	114508788V	ZAHN	CYNTHIA	0	3	\$1,039.22